

IT Professional Technical Services Master Contract Program T#:902TS Statement of Work (SOW) For Technology Services

Issued By: Ramsey County Information Services

Project: Symantec Client Management Suite 7.1 Upgrade to 7.5

Service Categories: Analyst-Technical; Desktop - Application

Business Need

Ramsey County, through its Information Services Department, (the "County") needs assistance with the upgrade of its Symantec Client Management Suite 7.1 powered by Altiris to version 7.5.

Deliverables (Scope of Work)

Contractor shall implement the upgrade in the following phases using the traditional project management approach.

1. Symantec Management Platform Upgrade

A. Assess

During this phase, Contractor will perform the following services:

- Review County's original vs. current requirements
 - List staff member(s) who will support the SMP server
 - List staff member(s) who will provide network support
 - List staff member(s) who will provide SQL support
 - List staff member(s) who will support the each solutions defined
- Assess the current Altiris 7.1 environment
 - Evaluate the health of the Altiris Notification Server
 - Evaluate the health and size of the Altiris Notification Server database
 - Evaluate the health of the main and remote site servers
 - Review and evaluate any open or outstanding Symantec support tickets regarding the Altiris environment
- Gather and/or review the following technical information, if applicable:
 - Current node count, network topology, operating systems in use, name resolution capabilities, OS and software standards, hardware standards

- Review the County's LAN and WAN infrastructure, and determine if Altiris 7.5 architecture should mirror Altiris 7.1 or be altered to accommodate new capabilities
- Notification Server 7.5 requirements, including assessment of the existing Notification Server, updated supporting third party software components, core solution settings, maintenance policies and disaster recovery plans.
- Site Server 7.5 requirements, including number and location of Site Servers to be upgraded, Package Service Agent configuration, Task Service Agent configuration and deployment method, if appropriate
- Assess County production environment for the Symantec Management Platform server 7.5 upgrade process
 - Gather Altiris 7.5 technical requirements and supporting information
 - Review Altiris 7.1 existing Microsoft SQL Database Server configuration, database size
 - Ensure 7.5 product licenses are available and downloaded from Symantec Licensing Portal
- Review base settings for Symantec Management Platform 7.5 server(s) and configure any new options and/or features

B. Design

During this phase, Contractor will perform the following services:

- Design the newly upgraded Symantec Management Platform 7.5 to meet the County objectives
- Plan with County's personnel the upgrade strategy
 - Timing of the upgrade
 - Downtime and change window considerations
 - External dependencies on the Altiris environment
 - Overall risk and impact of upgrade
 - List new functionalities and suggest changes to architecture based on new 7.5 capabilities

C. Transform

During this phase, Contractor will perform the following services:

- Perform in-place upgrade of the Symantec Management Platform and all solutions
- Verify sites, subnets and connection profiles are intact, if required

- Verify post upgrade Role and Scope based security is intact, if required
- Verify security post upgrade scoping of Organizational Views / Organizational Groups are intact
- Provide mentoring and knowledge transfer to County personnel to upgrade agent software, and to operate and maintain an upgraded Altiris 7.5 environment. Additionally, cover new platform capabilities
 - User Interface improvements
 - Client Registration

D. Operate

During this phase, Contractor will perform the following services:

- Contractor will provide all project documentation and a detailed review of the new technologies. This will be presented in a forum to address any remaining questions and/or management plans.
- Within the timeframe of the engagement, Contractor will provide day after support and monitor the implemented solution environment for needed adjustments and/or fine tuning

2. Symantec Client Management Suite (CMS)

A. Assess

During this phase, Contractor will perform the following services:

- Review County current and future requirements for Altiris CMS Solutions
- Review technical current and future requirements for Altiris CMS Solutions
- Review current role and scope based security settings for each CMS solution, validate security is still valid.
 - Document any changes needed
- For each CMS solution define pilot list of up to 5% of existing managed client computers for solution upgrade, limited to one (1) location
- Define any Altiris CMS specific component architecture that need to be upgraded
- Review CMS specific solutions being utilized to ensure solutions configuration and functionality is intact
 - Address any errors or problems with the current version of the SMS solution through remediation or documentation of the issue
- Define Altiris CMS solution agent upgrade methods (GPO, login script, SMP policy)
- Review County maintenance windows and change tolerance to an outage to Altiris CMS related services.

The following deliverables will be produced during this phase:

- Overview documentation of current CMS Solution configurations
- Document any outstanding issues with the current CMS Solutions
- Document appropriate change windows to upgrade the CMS solutions

B. Design

During this phase, Contractor will perform the following services:

- Provide the following design and/or planning related activities
 - Update or create a Visio design diagram showing a high level overview of the CMS architectural multi-solution component design
 - Provide agreed upon plan for phasing rollout of solution agent upgrade to the defined pilot group
- Review and recommend any changes to the Altiris SMS component architecture as it pertains the Altiris SMS version 7.5

The following deliverables will be produced during this phase:

- Updated Altiris CMS component diagrams and listing changes to component architecture, if applicable
- Provide documentation for release notes on Altiris CMS 7.5 solutions which illustrate fixes, known issues, and improvements

C. Transform

During this phase, Contractor will perform the following services:

- Update CMS solutions on one (1) Symantec Management Platform 7.5 server(s)
- Upgrade up CMS related site servers roles and plugins on one (1) site servers
- Enable County to roll out remaining site servers by developing site server migration process and providing support.
- Phase Upgrade to pilot list of computers
- Validate pilot computers upgraded successfully and install all plug-in upgrades
- Verify post upgrade configuration settings for Altiris Client Management Suite solutions are in-tact based on solutions assessment
 - Remediate settings that experienced changed, if applicable

Extended Per Solution Details

Software Management Solution

- Assess County's Software Management Solution 7.1 configuration and review differences with the 7.5 version

- Review original Software Management Solution requirements, including bandwidth throttling settings, package server utilization, automation policies, and reporting requirements
- Configure upgrade policy and phase in Software Management Solution agent to pilot computers
- Ensure software packages remain and are functional in the software library
- Ensure software delivery tasks and policy remain and are functional
- Test the software distribution of up to two (2) pre-existing software packages to pilot computers

Patch Management Solution

- Assess County's Patch Management Solution 7.1 configuration and review differences with the 7.5 version
- Review original solution requirements including desired patch distribution processes and SLA metrics regarding patching and rebooting
- Define Patch Management Solution configuration, including:
 - Bandwidth throttling settings
 - Multicast settings
 - Package server utilization
 - Software inventory and vulnerability analysis intervals
 - Software update deployment schedule
 - Reboot and end-user notification settings
 - Filters and policies for
 - Test deployment groups
 - Production deployment groups
 - Automation Policies
- Deploy Software Update agent to pilot computers
- Demonstrate the following Patch Management Solutions capabilities (as deemed appropriate):
 - Distribution of up to 3 software updates
 - Bandwidth throttling
 - Package multicasting

- Checkpoint/Restart of interrupted downloads
- Built-in reports, dashboards, and automation policies

pcAnywhere Solution

- Install and configure base settings for pcAnywhere Solution
- Configure security profiles for pcAnywhere Solution
- Deploy pcAnywhere Solution to target Pilot computers
- Review built-in reports, if required

Deployment Solution – Windows Imaging

- Assess the County's Deployment Solution 7.1 configuration and review differences with the 7.5 version.
- Identify the target computers for the pilot rollout
- Review site servers used for remote deployments
- Review existing automation OS (Linux, and/or WinPE) used for deployment automation
- Verify post-migration configuration and settings for Deployment Solution
- Regenerate pre-boot automation environments with the latest operating systems
- Upgrade Deployment Solution site roles on up to XXX (X) site servers, if applicable
- Verify existing deployment jobs and image are functional post upgrade
 - Test Deployment Solution two (2) jobs on up to two (2) computers
 - Test remote imaging at up to three (3) locations, if applicable
- Review DS and network architecture to support PXE in up to one (1) production location, and configure up to one PXE server
- Deploy the Deployment Agent to the pilot computers, if required
- Provide knowledge transfer regarding imaging processes

D. Operate

- Contractor will provide all project documentation and a detailed review of the new technologies. This will be presented in a forum to address any remaining questions and/or management plans.

- Within the timeframe of the engagement, Contractor will provide day after support and monitor the implemented solution environment for needed adjustments and/or fine tuning
- Prepare/Update documentation detailing the appropriate Client Management Solution configurations
 - CMS solution documentation
 - Site Server upgrade documentation

Maintenance documentation, if changes are significant

Project Schedule

The County would like to complete the Project within five (5) business days as it wants to mitigate downtime. The County is open to alternative schedules to accomplish this goal.

The term of any resulting work order will be limited to a term not greater than one-year from the date of final execution anticipating the completion of the existing master contract. The State reserves the right to transition any resulting work order to the new master contract program subject to its terms and conditions which will replace the current program. If such a transition is not possible, the contracting entity will work with MN.IT and the Department of Administration to review options to enable the continuation of the services being provided to the extent possible.

Project Environment

Contractor is expected to work on-site at the County Information Services department which is located at 121 7th Place E., St. Paul, MN 55101. General business hours are Monday through Friday, 8:00am to 4:30pm. The County will assign a primary contact for all formal communications.

Responsibilities Expected of the Selected Contractor

- The contractor will need to submit a project activity plan and schedule agreeable to the County.
- The contractor will assign a primary contact that will be responsible for all formal communications for the project.
- The contractor will hold periodic (at least weekly) status meetings during the project for interested County stakeholders.
- All County information and documentation is to be considered sensitive and confidential. Contractor will treat such information with the same degree of care with which it treats its own sensitive and confidential information.
- Contractor is to encourage and facilitate knowledge transfer with the County.
- The Contractor will act in a professional manner and abide by the County personnel rules and policies copies of which are available upon request.
- Contractor warrants that all services will be performed with the highest standard of professional service, be free from defects, and conform with the requirements of this SOW.

Required Skills

Required minimum qualifications:

Master Contract resource type(s)/ categories:

- Analyst – Technical,
- Desktop - Application (Design & Development)

Required Skills:

1 year experience with Windows 7, Active Directory, Altiris Client Management Suite, including successful upgrade deployment

Process Schedule

- | | |
|--|----------------------|
| • Deadline for Questions | 04/11/2014, 2pm CST |
| • Anticipated Posted Response to Questions | 04/14/2014, 5pm CST |
| • Proposals due | 04/16/2014, 5pm CST |
| • Anticipated proposal evaluation begins | 04/17/2014, 10am CST |
| • Anticipated proposal evaluation & decision | 04/18/2014, 2pm CST |

Questions

Any questions regarding this Statement of Work should be submitted via e-mail to:

Becky Kwapick, Contract Manager
Information Services
becky.kwapick@co.ramsey.mn.us

Questions and answers will be posted on the Office of MN.IT Services website at: (http://mn.gov/buyit/statements/mcp902ts_active.html) according to the **Process Schedule** above.

SOW Evaluation Process

- Resume/Experience with public sector 70%
- Hourly Rate 30%

This SOW does not obligate the State to award a work order or complete the assignment, and the State reserves the right to cancel the solicitation if it is considered to be in its best interest. The County reserves the right to reject any and all proposals.

Response Requirements

- Introduction
- Company overview
 - Company history, growth and accomplishments including any industry certifications.
 - Current financial data if publicly available
- Detailed response to all SOW requirements including but not limited to:
 - Contractor's plan to meet the County's business needs and fulfill the Deliverables/Scope of Work.
 - Contractor's hourly rate.
- Descriptions and documentation of Contractor's technical expertise and experience and how such meets the County's skills requirements.
- Name of Contractor's official contact person for any contractual relationship.
- Provide at least two references from similar projects.
- Conflict of interest statement as it relates to this project
- Required forms to be returned or additional provisions that must be included in proposal
 - a) Affirmative Action Certificate of Compliance
<http://www.mmd.admin.state.mn.us/doc/affaction.doc>
 - b) Affidavit of non-collusion
<http://www.mmd.admin.state.mn.us/doc/noncollusion.doc>

- c) Certification Regarding Lobbying
<http://www.mmd.admin.state.mn.us/doc/lobbying.doc>
- d) Veteran-Owned/Service Disabled Veteran-Owned Preference Form
<http://www.mmd.admin.state.mn.us/doc/vetpref.doc>
- e) Resident Contractor Form (if applicable)
<http://www.mmd.admin.state.mn.us/doc/residentcontractorform.doc>

Proposal Submission Instructions

Submit proposals via email no later than 5:00pm CST on 04/16/2014 to:

Becky Kwapick, Contract Manager
Information Services
becky.kwapick@co.ramsey.mn.us

General Requirements

Proposal Contents

By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of a work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the Contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

Disposition of Responses

All materials submitted in response to this SOW will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected contractor. If the Responder submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this SOW, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

Conflicts of Interest

Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a contractor is unable or potentially unable to render impartial assistance or advice to the State, or the contractor's objectivity in performing the contract work is or might be otherwise impaired, or the contractor has an unfair competitive advantage. The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the Contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime Contractor, and the terms "contract," "Contractor," and "contracting officer" modified appropriately to preserve the State's rights.

IT Accessibility Standards

Responses to this solicitation must comply with the Minnesota IT Accessibility Standards effective September 1, 2010, which entails, in part, the Web Content Accessibility Guidelines (WCAG) 2.0 (Level AA) and Section 508 Subparts A-D which can be viewed at: http://www.mmd.admin.state.mn.us/pdf/accessibility_standard.pdf

Nonvisual Access Standards

Nonvisual access standards require:

- 1) The effective interactive control and use of the technology, including the operating system, applications programs, prompts, and format of the data presented, are readily achievable by nonvisual means;
- 2) That the nonvisual access technology must be compatible with information technology used by other individuals with whom the blind or visually impaired individual must interact;
- 3) That nonvisual access technology must be integrated into networks used to share communications among employees, program participants, and the public; and
- 4) That the nonvisual access technology must have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Preference to Targeted Group and Economically Disadvantaged Business and Individuals

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime Contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime Contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at mmdhelp.line@state.mn.us. For TTY/TDD communications, contact the Helpline through the

Minnesota Relay Services at 1.800.627.3529.

Veteran-Owned Preference

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference on state procurement to **certified small businesses** that are **majority-owned and operated by**:

(1) recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;

(2) veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or

(3) any other veteran-owned small businesses certified under section [16C.19](#), paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time.

If you are claiming the veteran-owned preference, **attach documentation, sign and return the Veteran-Owned Preference Form with your response to the solicitation.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.